

Fresh Squeezed Fitness: A Case Study on the Marketing of Orangetheory Fitness

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ABSTRACT

FRESH SQUEEZED FITNESS: A CASE STUDY ON THE MARKETING OF ORANGETHEORY FITNESS

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The fitness industry has grown immensely in the past decade as a form of health management. The industry has expanded to offer niche fitness facilities that cater to individuals' specific needs and motivations. The purpose of this study was to examine the best marketing and branding practices utilized by Orangetheory Fitness. The research for this study was collected using a case study matrix, developed by the researcher, to evaluate Orangetheory Fitness' marketing strategies. The study resulted in findings indicating the importance of technology advancement and brand differentiation pertaining to the success of Orangetheory Fitness. It is crucial for Orangetheory Fitness to continue expanding their services and advancing their technology to remain competitive in the boutique fitness industry.

Keywords: Orangetheory Fitness, boutique fitness industry, exercise motivation, health management, marketing, technology

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Chapter 1

INTRODUCTION AND REVIEW OF LITERATURE

Background of Study

In the past decade, the focus of healthcare has begun to change from disease treatment to disease prevention (Davis, 2013). Health professionals are focusing on how to help people change their daily habits to live a longer, healthier life. Dr. Cotton explains, “I think we are seeing a greater acceptance of integrating prevention activities such as exercise into one’s lifestyle...and using exercise as a prescription for disease prevention” (Davis, 2013, p. 35). In 2017, the global health and fitness club industry generated a total revenue of \$87.2 billion with more than 201,000 fitness clubs worldwide (Rodriguez, 2018). Boutique fitness clubs that offer a specific workout such as indoor cycling, yoga, and high intensity interval training make up about 35% of the total industry (Hambrick, 2017). Different body types thrive off of different types of movement and require unique action plans to maximize their individual health. Niche fitness facilities provide a small group environment with a personalized coaching approach for the participant. Together, fitness trainers and healthcare providers have the unique opportunity to help break unhealthy habits and prevent disease.

Revolutionizing the fitness industry, boutique fitness franchises are growing at an exponential rate; from 2012 to 2015, their market share increased by 70% (Rodriguez, 2018). These studios provide a single focused workout (e.g., yoga, cycling and circuit training) that has been carefully formulated by fitness professionals and even scientists. With a variety of studios looking for membership, businesses must differentiate

themselves to maintain a competitive advantage in the fitness industry (Woolf, 2008).

The purpose of this study was to examine the best marketing and branding practices utilized by Orangetheory Fitness.

Review of Literature

Research for this review of literature was conducted at Robert E. Kennedy Library on the campus of California Polytechnic State University, San Luis Obispo. In addition to books and other resources, the following online databases were utilized: Academic Search Elite, SPORTDiscus, Hospitality and Tourism Complete, psycINFO, Proquest, and Google Scholar. The review of literature outlines the overall rise of the fitness industry as a form of health management, motivations for exercise, and diversification in boutique fitness studios.

Fitness as Health Management

Research from scientists, doctors, business innovators and exercise professionals point toward exercise being the medicine of the future (Sweaney, 2014). Exercise has a history of being encouraged as a social program, long before the recent increase in popularity of fitness centers and personal trainers (Maguire, 2001). More recently, exercise has been proven by scientists to lower the risk of countless physical and mental health issues such as diabetes, obesity, heart disease, various cancers, anxiety, and depression. There is no other single prescription drug or medicine available to consumers which results in the same diverse array of health benefits that regular physical activity can provide (Berra, Rippe, & Manson, 2015). An assessment of one's weekly physical activity is accompanied by the routine check on blood pressure, heart rate, height and

weight followed by doctor recommendations based on personal health needs. Not only has the advice from the physicians significantly increased positive exercise habits in patients but has also increased overall satisfaction with the medical care they received (Berra et al., 2015). The fitness industry owes a portion of their rise and success to the high cost of treatment in health care in the late 20th century, as this created a means for individuals to seek more preventative care regarding their health (Maguire, 2001). Through prevention and healthy lifestyle changes, people are encouraged by doctors and health care professionals to take more preventative measures, rather than solely curative care considering their health.

Corporate professionals in all fields of business are also recognizing the importance of their employee's physical activity. Employee wellness programs are common within many corporate salaries as a stipend or reimbursement to encourage membership with a fitness facility to encourage a well-rounded lifestyle in their employees (Kohl, 2016). As of 2015, over 80% of employers offer some type of wellness program or preventative health service (Kohl, 2016). Wellness programs have been found to be inclusive, impactful and successful for all employees regardless of whether they have ever stepped foot into a fitness facility before (Davis, 2013). Companies are taking credit for instilling the resources their employees need to decrease stress, manage body weight, stop smoking, and eat more nutrient dense foods (Kohl, 2016). Given the positive impact that physical activity has on individuals, exercise professionals must take individuals' motivations for exercise into consideration when marketing their business.

Exercise Motivation

The reasons people partake in routine physical activity can be generalized by two major categories: extrinsic and intrinsic motivation (Brown, Miller, & Palmer, 2017). Extrinsically motivated individuals are driven by appearance-related goals such as body weight, muscle definition, and body shape. Intrinsic motivations stem from performance-related goals such as stress management, strength, and endurance training (Brown et al., 2017). Results from a study designed to measure motives in physical activity showed it is also possible, and quite common, for people to contain both intrinsic and extrinsic motivation (Kilpatrick, Herbert, & Bartholomew, 2005). Furthermore, these motivations have shown an effect on overall wellbeing. Extrinsically motivated individuals are more likely to face low self-esteem and dissatisfaction with themselves if they don't see progress from exercise. Intrinsically motivated individuals are more likely to feel enjoyment when they exercise and ultimately establish a longer commitment to exercise from their positive experience (Brown et al., 2017). Since extrinsically motivated individuals' mental health is at risk even when engaging in physical activity, it is important for fitness facilities to offer services that address establishing a healthy mindset along with a fitness routine.

Both forms of motivation, or a mixture of the two, play into the consumer culture of branded fitness. Companies market the services they provide to appeal to specific consumer groups (Woolf, 2008). Branding and advertising factors such as the names of the fitness classes offered, celebrity endorsement, class descriptions, presence of mirrors, or even inspirational quotes on the walls can detract or attract people from participating (Brown et al., 2017). Fitness media began growing in the 1980s with the introduction of

at-home workout videos, the birth of the “self-help book” genre, and the “celebrification” of fitness; celebrity association with an exercise program boosted the brand’s credibility, trust, and curiosity within customers (Powers & Greenwell, 2017). Fitness media has skyrocketed with the recent growth of social media as a branding platform and a base for cultivating connections with consumers (Wright, Williams, & Byon, 2017).

Fitness brands wrestle with the undertaking of being able to successfully promote their business while simultaneously helping individuals develop a positive relationship with their body and a healthy mindset toward exercise. Research has shown there is a gap between the way a fitness club wants to be perceived and its actual social representation (Wright et al., 2017). Fitness clubs perform a branding balancing act of being a place of motivation as well as encouragement for their members. The rise of niche focused studios in the fitness industry has showcased an expertise understanding of branding and “a practical grasp of the importance of communicating in a strategic, marketable and “on-message” fashion at all times...in an era of omnipresent, attention-seeking social media” (Powers & Greenwell, 2017, p. 528).

Boutique Fitness Studios

Establishing an advantage in a competitive industry is a goal of most businesses. A way to achieve advantage over competing business who appear identical to consumers at first glance, is to differentiate their services (Powers & Greenwell, 2017). The aspects which differentiate a company are usually what draw in specific consumer groups (Woolf, 2008). Boutique fitness studios that hold a strong competitive advantage in the industry establish their company as a recognizable brand. This establishment articulates

not only professionalism and expertise but an understanding of the importance of presence on social platforms (Wright et al., 2017).

One company that is extremely well known by the general public and could even be labeled as the boutique fitness industry's defining brand is SoulCycle. SoulCycle offers instructor led stationary bike workouts. Through celebrity publicity, word-of-mouth marketing, social media marketing and community engagement, the studios have grown into a \$122 million organization (Hambrick, 2017). The brand as a whole is marketed to be recognizable even to someone who has never attended a SoulCycle class and create desire, curiosity and interest through repetitive appearance in the media. Fitness has emerged as a trend of luxury, a marker of status, a form of social capital and a self investment in one's wellbeing (Powers & Greenwell, 2017). Social media branding helps set an expectation of the experience and the overall aesthetic of the business, allowing the consumer to decide if the brand itself aligns with their personal brand (Wright et al., 2017).

Boutique fitness studios uniquely cater to all interests of the population across a wide range of locations. The challenge that niche facilities face is how to diversify their establishment so much that it cannot be easily replicated (Sweaney, 2014). One way to introduce diversification within a company is to create complexity within the services being offered. A program tailored to a specific consumer group's needs, also increases the cost customers are willing to pay (Woolf, 2008). This is why boutique fitness studios are able to successfully charge customers almost double that of what regular gym memberships cost (Hambrick, 2017). In order to reach these segmented groups in the public, the company must identify their target audience. Instead of defining a target

audience by a demographic category such as age, gender or economic status businesses must define their ideal customer based on motivations, habits, goals, values and needs (Woolf, 2008).

Research Questions

This study attempted to answer the following research questions:

1. What marketing and branding strategies are currently being utilized by Orangetheory Fitness?
2. What type of business model does Orangetheory Fitness follow to expand geographically and financially?
3. What makes a location desirable to open an Orangetheory Fitness studio?
4. How has Orangetheory Fitness engaged its members and local communities?

Chapter 2

METHODS

The purpose of this study was to examine the best marketing and branding practices utilized by the Orangetheory Fitness Studio. This chapter includes the following sections: description of organization, description of instrument, and description of procedures.

Description of Organization

A case study was conducted on Orangetheory Fitness. Orangetheory Fitness was founded in 2010 by Ellen Latham, Jerome Kern and David Long (Lima, 2016). Now, with over 1,000 studios worldwide, in 49 states and 18 countries, Orangetheory Fitness has been deemed the fastest growing fitness franchise company (Raphael, 2018). Every day, the same workout is delivered to each studio across the nation, which is never the exact same as a previous day's workout. The exercises are developed, tested, and approved by Orangetheory headquarters personal trainers before being implemented in the studios (Ward, 2018).

The one-hour, full body workouts, focus on training endurance, strength, and power. Participants rotate through intervals using treadmills, water rowers, and floor equipment. The heart-rate based interval training, burns more calories post workout than traditional exercises. The scientific theory supporting this claim is known as Excess Post-Exercise Oxygen Consumption (EPOC). Participants aim for 84% or higher of their maximum heart rate for at least twelve minutes of their workout to produce the "after

burn” effect, an increased metabolic rate for up to 36 hours post-workout. Each participant wears a heart rate monitor, which displays real time results on large screens throughout the studio. The level of intensity differs for each participant as it is based on individual fitness level and effort, making the workout effective for all levels. The workouts are led by highly trained and certified coaches to prevent participants from over or under training (Orangetheory Fitness, 2018).

Description of Instrument

The instrument utilized in this study was a case study matrix developed by the researcher (see Appendix A). This guide was formulated into two main categories: business notes and marketing notes. The “business notes” section identified the company mission, technology, community, studio layout, and employee training. The “marketing notes” section identified the product, price, place, promotion and social media. A pilot test was conducted on Barry’s Bootcamp in order to test the instrument. After the pilot test, the researcher altered the instrument by including environment to studio layout, community to include aspects of the culture within the community and replacing company mission with business model.

Description of Procedures

This case study consisted of a thorough analysis of the best marketing practices of Orangetheory Fitness. The research was gathered over a two-week period from October 29 through November 12, 2018. During the research phase, the researcher used the case study matrix to gather, record, and analyze information from the Orangetheory Fitness

website and other third-party websites. From the Orangetheory Fitness website, information was gathered from the following tabs: Why It Works, Community, Events, Media Kit, Real Estate, FAQ, Own A Franchise, and Memberships. The third-party websites used for this research included: TODAY, FOX News, CNBC, Popsugar, Cheddar, Men's Journal, Shape, Entrepreneur, Forbes, Women's Fitness Magazine, Health Tech Buzz, YouTube, Instagram, and Facebook. Both quantitative and qualitative information was gathered for a complete overview and understanding of the study, and to ultimately answer the research questions.

Chapter 3

PRESENTATION OF THE RESULTS

The purpose of this study was to examine the best marketing practices utilized by the Orangetheory Fitness. A case study approach was utilized for this study. This chapter includes the following sections: Business Operations, Technology, and Community Engagement.

Business Operations

As the fastest growing franchise in the fitness industry, it is no secret that Orangetheory Fitness (OTF) is doing something right. OTF is constantly pursuing new locations in new and existing markets. In January of 2018, OTF set a goal of opening 365 new studios, one per day, and they are on track to meet this goal by the end of 2018. With over 1,000 locations worldwide, the OTF team has designed a precise formula of requirements to narrow down an ideal geographic location. The criteria includes location in a major city or suburb area with a population of at least 7,500 qualifying households, an average household income of \$75K+, and a majority of the towns citizens to be between 19-60 years old. Opening an OTF studio can drive high-income consumers to the retail location every day in both established and growing markets.

When selecting real estate to develop an OTF studio, there are certain requirements a specific site must meet. An ideal OTF space will meet the following requirements: about 3,000 square feet of space, 28+ feet of frontage space for reception area, 10 feet minimum finished ceiling height, at least 20-25 parking spaces, high speed

Internet provider, heating and air conditioning, electricity, excellent visibility and access, and high walk-by rates.

OTF follows a multi-unit franchise business model, where one franchisee owns and operates more than one unit, traditionally in the same general region. Most OTF franchisees own three to five locations which allows for a strong and successful team to be built within their network of knowledge, without getting overwhelmed and losing control over the product.

The first OTF class a consumer takes in their local area is free of charge. OTF wants consumers to experience an OTF class with no commitment then decide if a membership would be a valuable investment. Anyone can drop in to the studio for one class for a fee of \$28. For \$159 per month, members have access to unlimited classes. There are other class packs available for purchase ranging from \$60-100. Prepaid memberships are transferrable across all OTF studio locations. This allows for customers who are traveling but want to attend a class at another location to do so, without penalty or complication.

Technology

As technology continues to evolve, OTF is taking advantage of the advanced data and analytics at their disposal and integrating it into the daily lives of their members. OTF strives to give their customers more information about their progress on their journey whether it is for weight loss, strength, endurance or other fitness goals. To do this, OTF integrates technology as a vital aspect of the user experience. OTF has their own line of wearable heart rate monitors that range in capabilities, price and wear-ability.

The OTbeat Burn, released in August 2018, is the newest device which can track distance, steps, calories and blood flow whether the wearer is at an OTF studio or not. The device connects to a mobile app which displays real time data, performance summaries and allows the user to set personal workout goals. OTbeat Burn's advanced technology also allows the device to sync with the user's treadmill at OTF, which will automatically pick up their profile name and data as soon as they step on the machine.

The integration of technology as part of the member's fitness journey and studio experience is a way OTF has been able to gamify exercising. Gamification is the process of turning a mundane task into a rewarding game through technology. For every minute an OTF member spends in the Orange Zone, they are rewarded with one "splat point." Every class, members are challenged to earn at least 12 splat points, or 12 minutes, in the Orange Zone to achieve the benefits of Excess Post-Exercise Consumption (EPOC). A user's accumulation of splat points is tracked on their account's performance summary and through the mobile app. The new OTbeat Burn device also awards splat points outside of the studio when the wearer reaches their Orange Zone heart rate. As OTF technology evolves, data analytics and artificial intelligence are integrated into the user's daily lives as well as business operations in simple, accessible ways.

In 2017, OTF implemented a business intelligence (BI) portal which has allowed for actionable reporting through their operating system. The BI system has the capability to provide data analytics in real time about each franchisee's studio performance, member behavior and trends enabling the owner to make impactful decisions for their business and drive profits. The BI system previously detected a strong correlation between low utilization customers and high cancellation rates. The system can pick these

customers out individually and empower the owner to proactively reach out to that customer to understand how the OTF brand can better meet their needs. By reaching out individually to customers, OTF builds relationships with their members by recognizing their individual needs and goals of their membership. The BI system is cloud-based, allowing for universal access to information.

Community Engagement

The mission of OTF is to create a healthier world. The brand promises that with more trips to Orangetheory, comes more vibrancy of life outside the gym. One of the ways OTF inspires community is by hiring individuals who view the organization as more than just a job. With a workforce of 75% millennials, OTF hires employees who have the kind of motivation and energy they want to instill in their members lives. OTF coaches know how to adjust their approach and encourage individuals based on their own needs and abilities. The coaches connect with members on a personal level by helping them achieve results that improve their overall health. An OTF coach provides the same benefits of a personal trainer, but in a group setting. Even with technological advancements, no device or artificial intelligence could ever replace the personal interactions and relationships built between coaches and members. Data and analytics are excellent for performance and tracking physical achievements, however they cannot track happiness or emotional gain from participation.

Another way OTF builds a community is from the variety of age groups brought into the studios, from teenagers to seniors, allowing for inter-generational interaction and appreciation. Most social interactions are typically limited to people of the same age

whether it is at work, online, at school, or other social settings. OTF brings people in nearly all life stages together who are investing in their health and fitness. Even members who do not attend the same studio or are in different parts of the world such as Australia and New York city can relate because they do the same workout in the same day. Members can interact and share their journey or experience through private OTF Facebook groups and OTF studios' Instagram accounts. This provides inspiration and social benefits that form a community of people based on their values and interests, not just demographics.

OTF invests in experiential marketing and media marketing to influence the brand among the strong OTF community. Throughout the year, each studio holds events that are athletic challenges for their members such as 12 Days of Fitness, which is a holiday themed week of workouts. The other events held are the Transformation Challenge, Dri-Tri, Marathon, All Out Mayhem, Hell Week, and Orange Voyage. OTF's presence is large with over a 1.2 million following through Instagram and Facebook. However, the company does not solely rely on social media to communicate their brand image. OTF has a media marketing budget of \$18 million. The extensive budget enables brand storytelling outside of social media, and the ability to leverage PR and content integration on other platforms. OTF has plans to integrate their brand into content that is ingrained in culture such as being part of the storyline of a Netflix or Amazon show. In 2017, OTF hired a media planner and buyer to help with the integration of artificial intelligence to the company. Since then, OTF has relied less on social media, guerilla marketing, and word of mouth marketing because the new platform has shown to pay dividends and fill new studios with members. The coaches, the community vibes, the endorphins, the

friendly competition, the loud music, and the technology work together to enhance the customer experience that is always changing.

Chapter 4

DISCUSSION AND CONCLUSIONS

Orangetheory Fitness (OTF) is a leader in the fitness industry whose marketing and branding efforts successfully differentiate the company from other competitors in the industry. The research focused on the ways in which OTF is able to attract individuals with different motivations and encourage health management. This concluding chapter will include the following: a discussion of the findings, limitations, conclusions based on research questions, implications of the findings, and recommendations for future research.

Discussion

Extensive research was conducted on the company OTF which provided evidence for three major findings examined in this chapter: the marketing and branding strategies used by OTF, the importance of site selection and business operations, and the importance of differentiation as a competitor in the boutique fitness industry.

OTF utilizes a mixture of marketing and branding platforms including events, staffing, technology and social media. This non-traditional sense of marketing helps reiterate to consumers on multiple platforms the idea that the OTF regimen is a solution and valuable resource for health management. A large portion of the consumer experience at OTF is the technological aspect of the workout. The researcher found that members wear monitors during class which track heart rate and caloric activity. With real time results and statistics OTF facilitates a unique way to measure health and fitness

progress. The technology provides recorded proof that physical activity is resulting in an improvement of physical and mental health (Berra et al., 2015). The fitness industry has an opportunity and growing responsibility to change people's lives through the utilization of technology. To remain competitive, OTF should continue to update and expand their technological offerings as technology evolves. An entire study could be dedicated to researching the technology in the fitness industry, specifically how integrating technology to the OTF experiential marketing efforts could benefit the company.

By following a franchise business model with multi-unit owners, OTF is able to establish studios in new locations quickly and efficiently. Utilizing this type of business model may be the reason OTF has been able to open over 1,000 locations across the globe in the short time span of eight years. With multi-unit owners who have already become proficient with OTF operations, comes the seamless replication of studios and a consistent member experience. The assembly line model of new studio openings paired with successful marketing and branding demonstrates OTF's professionalism and expertise in the industry (Wright et al., 2017). The professionalism demonstrated through the OTF business operations may allow for opportunities with stakeholders that competitors in the fitness industry would not be able to compete with due to lack of progress. As fitness continues to grow as a form of health management, OTF should consider developing relationships with insurance companies, employee wellness program coordinators and other healthcare providers. Doing so could allow for the integration of OTF as a benefit in addition to salary or wage for individuals to use as health management. As OTF emerges as a leader in health management, there is opportunity to expand as a holistic healthcare provider for their members. Doing so would expand the

OTF studio support services to a new level of expertise and professionalism, making their service bundle even more difficult to replicate by competitors (Sweaney, 2014). OTF should consider developing personalized nutritional meal programs for their members, to aid in the achievement of their fitness and health goals.

OTF differentiates their brand among other similar companies through human connection and community engagement. Whether it is online or the result of friendly competition, OTF curates opportunity for members to relate and connect with other members of the community who share similar goals but, may be motivated by different factors. OTF studios hold “Transformation Challenges” which is an eight-week period in which members who choose to participate are tracking their weight loss. OTF Studios hold an annual “Dri-Tri Challenge” in which participants complete a 5K treadmill run, 2,000-meter row, and 300 body weight exercises as quickly as they can. The “Transformation Challenge” would most likely attract extrinsically motivated individuals who are aspiring to make changes to their body appearance, while the “Dri Tri Challenge” would most likely draw intrinsically motivated individuals seeking to beat an endurance goal set for themselves. As studies have shown, it is also quite possible and relatively common for individuals to be motivated by both extrinsic and intrinsic factors (Kilpatrick et al., 2005). These events are held across all locations so members who attend studios in different states or even countries are able to share their results with one another, adding to the OTF community development. Continuing to host events rooted in both motivational aspects will curate continuous participation and excitement about the events at OTF. An opportunity for growth in community development and human interaction presents itself as an experiential marketing tactic. Larger scale events outside

of the studio such as a half marathon, triathlon or fitness festival could heighten the OTF experience to a new level that has yet to be explored.

There were several limitations that impacted the research and results of this study. First, the researcher may have been influenced by a personal bias in favor of OTF due to past experience in attendance of the studio. Second, the researcher utilized many articles linked directly from the OTF website which could have presented a bias standpoint, assuming the company would not promote negative media on itself. In addition, more in-depth research could have been conducted on the company. The short amount of research time did not allow for exploration on certain aspects of the company which may have affected the member experience portion. Finally, OTF is a relatively new company in the youthful boutique fitness studio industry that despite large growth, has an unforeseen future ahead. Although the research was presented with limitations, the researcher intended to conduct a thorough analysis and understanding on the marketing practices of OTF.

The results of this study demonstrate the strategic marketing and branding practices of OTF as a driver of the company's huge success. Through strong brand recognition, experiential marketing and digital marketing OTF has established itself as a leader in the fitness industry. The replicable business model and motivational employees give OTF a high level of recognition and loyalty in member participation. It is crucial for fitness companies to continuously expand their brand and differentiate themselves in order to remain competitive with other companies in the industry.

Conclusions

Based on the findings of this study, the following conclusions are drawn:

1. Orangetheory Fitness utilizes experiential marketing, digital marketing and technological advancements to enhance their brand image recognition.
2. Orangetheory Fitness follows a franchise business model with multi-unit owners.
3. Orangetheory Fitness requires that each studio meet specific demographic standards and location requirements.
4. Orangetheory Fitness engages its members with motivating employees, athletic challenges, and through social media to form a community of health driven individuals.

Recommendations

Based on the conclusions of this study, the following recommendations are made:

1. Orangetheory Fitness should continue to implement technology as an integral part of the member experience.
2. A research study should be done on the use of technology in the fitness industry, focusing on the benefits of technology to companies' experiential marketing efforts.
3. Orangetheory Fitness should develop relationships with corporations and insurance companies to offer their services as an option within employee wellness programs and insurance plans.

4. Orangetheory Fitness should continue to hire motivated and dedicated employees who are passionate about fitness and health management.
5. Orangetheory Fitness should host large scale events to unite members across nations and enhance community development among members.
6. Orangetheory Fitness should expand their studio support services, such as personalized nutrition plans, to differentiate from competitors.

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APPENDIXES

Appendix A

Instrument

	Description of Practice
BUSINESS NOTES	
Business Model	
Technology	
Community & Culture	
Studio Layout and Environment	
Employee Training	
MARKETING NOTES	
Product	
Price	
Place	
Promotion	
Social Media	